SERVING THE TOTAL FOODSERVICE INDUSTRY

JUNE 24, 1992

®RESTAURANTS & INSTITUTIONS

A CAHNERS PUBLICATION

BUILD A BETTER BREAKFAST!

BREAKFAST BASICS:
Eggs, Meats, Sides, Condiments, Breads, Potatoes, Beverages

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ABOUT THE COVER

Sweet and savory accompaniments grace our tower of waffles. Breakfast breads story, page 68.

✳ A light recipe: Offers reduced calories, fat, cholesterol and/or sodium compared with standard preparation.

Success in Targeting Seniors

Every Wednesday morning, a group of senior citizens from the First Presbyterian Church in Montrose, Colo., gathers at McDonald's for breakfast, fellowship and, well, a bit of harmless gossip. The wait staff, familiar with the folks who come in, make the atmosphere warm and friendly.

It might not sound like a well-planned marketing strategy, but welcoming local church groups, bingo clubs and civic organizations to their restaurants is one successful way that chains are reaching senior citizens.

A&W gives grandparents coupons for 99-cent "Play Town Meals" when they bring their grandchildren in to eat.

"A lot of senior citizens come into the restaurants for our weekly bingo night," says Judy Kelly, advertising and communications administrator for A&W, Livonia, Mich. "And holding meetings at the restaurants is something we do with local churches."

FUN AND GAMES

Some Burger King restaurants sponsor bingo nights, and Shoney's offers discounts to civic clubs that hold lunchtime meetings in its restaurants.

On a national level, most chains participate in a 10% senior citizen discount. King's Table Buffets also asks seniors to fill out raffle tickets when they apply for "gold" discount cards.

"Every week, we throw their card into the bowl. If they come in and their name is on the board, they get a free meal," says Dave Heiss, director of marketing for the Bellevue, Wash.-based chain. Customers have to come to the restaurant, however, to find out whether their card was chosen.

Numbers speak well of the chain's efforts to target the senior group; an estimated 60% of its daytime customers falls into the senior-citizen category.

Discounts for grandparents are another effective way of marketing to seniors. For instance, A&W gives grandparents coupons for 99-cent "Play Town Meals" when they bring their grandchildren in to eat.

SPECIAL MENUS

Chains also are developing special menus that cater to the appetites and diets of seniors.

"In the Florida and California markets, there's a real influx of senior citizens," says Mark Brenden, franchise marketing manager for Grandy's. "We had taken the roast chicken off the menu, but the senior citizens prefer this product to the grilled, which is a little spicier."

The result? "By putting it back on the menu, we had a very good first quarter," says Brenden.

Specific menu items draw in the senior crowd at Wendy's, too. "Our menu lineup is very appealing to senior citizens. There's chili, which is low-fat and high-fiber, and the baked potatoes and salads are popular," says Denny Lynch, vice president of communications for Wendy's International, Dublin, Ohio.

Because Wendy's doesn't make a sandwich until it's ordered, the chain has no problem filling special requests for seniors who have dietary restrictions, adds Lynch.

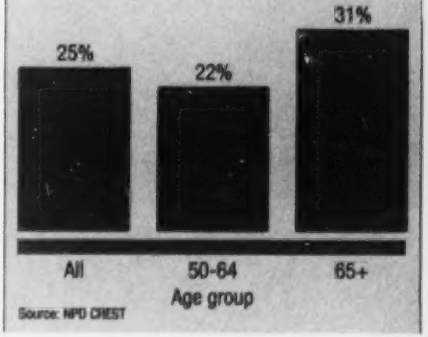
Other chains, for example, Country Kitchen and Perkins Family Restaurants, have developed separate menus for seniors.

"When we did our testing, we found that seniors didn't like such large portions," says Donna Guido, spokeswoman for Perkins Family Restaurants. The special menu items are usually the same as items on the regular menu, she says, but portions and prices are reduced. —K.C.

SENIORS SEEK OUT SPECIALS

Customers 50 to 64 years old typically are at the peak of their earning potential; they are less likely than the average guest to leap at the price promotions. After customers reach 65, however, and their incomes become fixed, use of meal deals jumps.

% of restaurant visits in which deal is employed



Source: NPD CREST

Chains Switch from Network TV

Restaurants have dramatically changed the way they spend money for television advertising in the last five years, according to data gathered by New York-based Arbitron Co.'s MediaWatch.

Currently, advertisers who wish to reach television audiences have four primary avenues available to them: network (ABC, CBS and NBC), syndicated (Fox and other smaller non-networks, as well as individual shows like "Wheel of Fortune"), spot (local/regional shows) and cable.

Comparing 1990 with 1991 shows network TV as the loser, with a 13% decrease in ad spending by restaurants. Cable showed the largest growth in ad spending with a 39% gain.

Cable, in fact, is the fastest-growing outlet for restaurant spending. Between 1987 and 1991, restaurants increased cable spending by 824%. In the same time period, network and spot TV ad spending each increased only 9%. Syndicated ad spending has only been tracked since 1988, yet by 1991 had increased 305%.

In terms of how much money is actually changing hands, however, cable is not knocking anyone off the block yet. Cable spending for 1991 capped off at $45.3 million. That's small potatoes compared to spot TV's $876.3 million in restaurant ad spending.

Following the trends, Nashville, Tenn.-based Shoney's spends most of its television ad time on spot. Ty Hasty, senior vice president of marketing for Shoney's, says spot is more economical than network for the chain because it is not national in distribution.

National exposure is one of the reasons network TV ad time is so expensive. National cable, on the other hand, offers a national viewership at lower rates. Beginning this year, Shoney's experimented with buying time on national cable and now is evaluating increasing that spending.

Carvel Ice Cream Bakery spends 95% of its TV money on spot and the remaining 5% on cable. Most of the Farmington, Conn.-based chain's units are located in the Northeast, making a national TV effort impractical. Local cable, however, has Carvel's attention.

"We may be expanding in selected markets where we have limited store distribution," says Syl Sosnowski, vice president of marketing. "But we're playing it rather cautiously."

The reason, Sosnowski says, is that some smaller cable stations Carvel has encountered do not have the data to back up the demographics of their audiences. Carvel relies on its franchisees for input on local cable shows.

Pizza Hut, Wichita, Kan., has taken advantage of the increasing popularity of cable shows. In May 1990, the Nickelodeon network began sponsoring the chain's ongoing Tuesday Night Kids Eat Free promotion. Mark Mears, director of national event marketing for Pizza Hut, says the chain spends about 15% of its TV budget on cable.

As more chains like Pizza Hut open their eyes to alternative TV ad spending, they might be inclined to open their wallets, too. As Hasty of Shoney's says about cable, "You have to look at what you can do to stretch your dollar."

—B.M.

RESTAURANT INDUSTRY TV AD SPENDING

Type of buy	Spending in $ millions 1987	1988	1989	1990	1991	% change 1990-91	1987-91
Network	498.0	514.8	604.4	624.3	541.4	-13%	9%
Syndicated	NA	25.0	43.1	88.6	101.4	14	305*
Spot	800.4	804.0	838.2	828.1	876.3	6	9
Cable	4.9	7.7	22.3	32.4	45.3	39	824

Source: Arbitron's MediaWatch Service, New York; *from 1988

For full-service restaurants, attracting busy weekday customers is especially challenging.

BEST BETS FOR BREAKFAST

Operators look for secrets to catching customers early and often.

By Rajan Chaudhry

Consumers might be hungry for breakfast, but they're starved for time. In fact, breakfast is the most frequently skipped meal in America, according to the National Restaurant Association.

Today's hectic lifestyles have swelled demand for convenient breakfast products: Consumption of breakfast sandwiches at eating places has increased 50% since 1983, and orders of biscuits, bread and muffins have advanced more than 20%, according to the NPD Group, Park Ridge, Ill. Meanwhile, orders of traditional breakfast items—ready-to-eat cereal, eggs, pancakes, waffles and French toast—have declined.

GRAB AND GO

The emergence of convenience as the ruling trend in weekday breakfast has created opportunities for some operators and difficulties for others.

Full-service restaurants are among those that have felt the squeeze. Both Bob Evans Farms, Columbus, Ohio, and the Village Inn, Denver, two of strongest breakfast players among family-dining chains, say morning traffic is flat. "It's pretty well documented that people are working more hours," says Roger Williams, group vice president for Bob Evans. "And the competition for something quick on a weekday has grown inordinately. If you compare it to 10 years ago, there are tens of thousands of places where you can now get a decent cup of coffee and something hot, all the way from gas stations to c-stores."

Even many of those positioned to compete for the quick-service breakfast business are finding the going tough. Take, for example, the Los Angeles market, where—even before the riots in the final days of April—quick-service breakfast traffic was soft despite Taco Bell's push into the daypart.

"In L.A., the percentage of [quick-service] visits for breakfast has remained really flat," says Robert Sandelman, president of Sandelman & Associates, a Brea, Calif.-based marketing research firm that tracks fast-food chains on the West Coast. "It's always

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Selling newspapers in the cafeteria gives customers one more reason to stop in.

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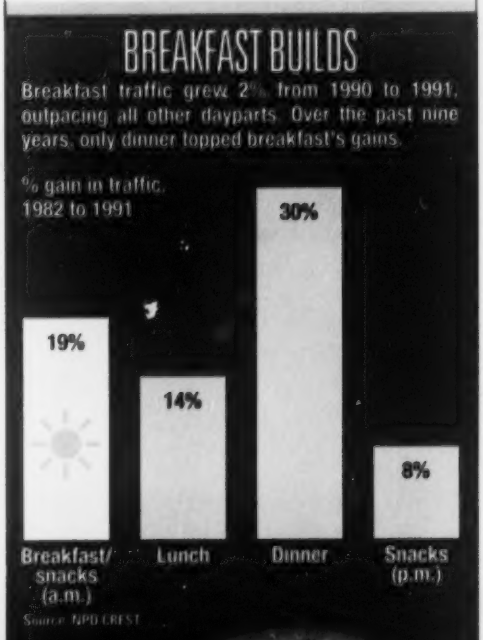
been in the under-10% range, and even with a new major player [Taco Bell] introducing breakfast, it hasn't increased breakfast's share of purchases. . . . It's not encouraging more people to use fast-food chains for breakfast, or the ones who are using them to go more often."

Over the past eight years, breakfast traffic has advanced 19%, keeping pace with industry growth, according to NPD's CREST research. Last year, led by quick-service restaurants, breakfast traffic gained 2%, outpacing the industry's 1% increase. Nevertheless, breakfast's share of total food-service occasions has held steady at about 12% since 1983.



Breakfast sandwich orders have grown 50% since 1983.

MARKETING VARIETY

While the challenges of building breakfast extend across foodservice segments, so fortunately, do many of the solutions.

At The Wood Co.'s Meridian Bank account in Reading, Pa., Foodservice Director John Roliz has geared his operation to capturing the convenience customer. "The comment that I get from my customers is that most of them don't want to spend 15 minutes to consume a breakfast in the cafeteria," says Roliz. In response, he's positioned grab-and-go foods as the stars of the breakfast lineup.

Roliz also differentiates his operation from quick-service places by offering greater variety. "We do muffins galore," he says. Hot sellers include apple raisin, banana nut, and chocolate muffins with chocolate chips. "We also do very well with croissant sandwiches and muffin sandwiches, along the same lines of what McDonald's and Burger King are trying to do," he adds.

Bagels, which Roliz buys partially baked, are another strong seller ("We finish them off so that what the customer is getting is a fresh hot bagel"). To top off the bagels, he offers flavored cream cheese and butter.

In addition, Roliz offers a fresh fruit bar—featuring toppings and accompaniments including granola, yogurt, cream cheese and cottage cheese—that converts to a dessert bar later in the day.

To draw customers and boost convenience, Roliz sells newspapers in the cafeteria and merchandises single-serving juices at the fruit bar "so that people don't have to walk across the room to the display case."

Despite operating within an office building, Roliz says he's in a tug of war for morning traffic. "Breakfast is something that we've really had to work at, because in this building there are 10 different coffee stations that sell coffee for 25 cents a cup." Roliz says his efforts are paying off. "I've seen my breakfast business increasing stead-

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Bob Evans boasts two new skillet breakfasts and a fruit dish.

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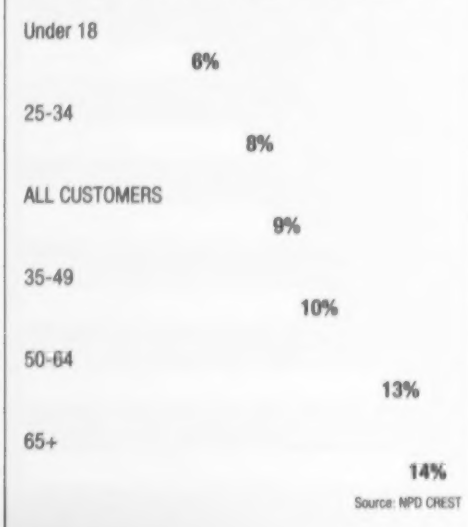
ily, even though population of the building has remained stable." Roliz serves about a third of his 700 guests per day at breakfast and generates 10% to 15% of sales in the morning.

Variety also is a keystone of The Wood Co.'s Lafayette College account in Easton, Pa. There, students choose their own ingredients for made-to-order omelets. And they make and top their own waffles.

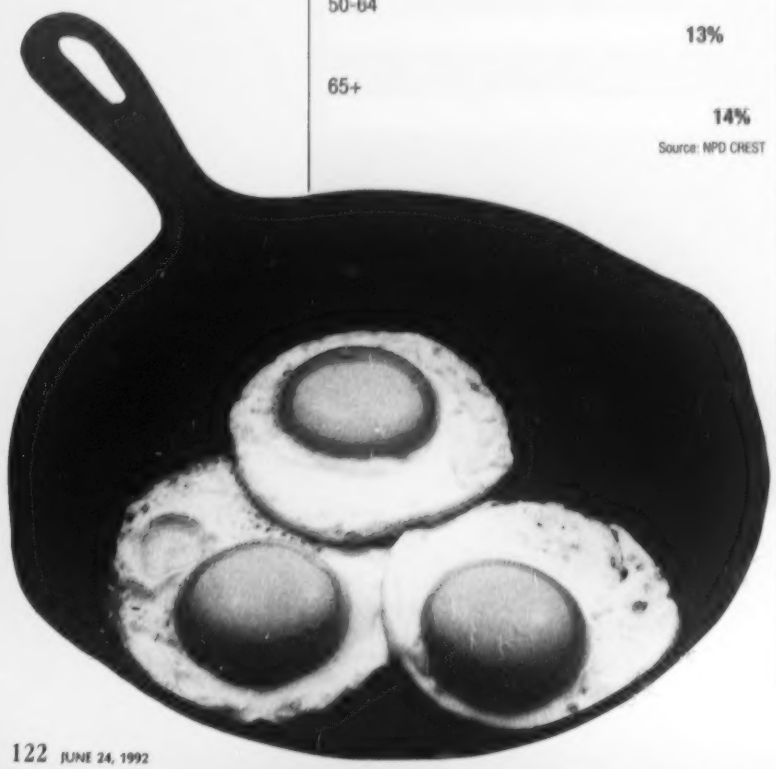
According to Jerry Witt, Lafayette's director of dining services, convenience items such as giant-size muffins and breakfast sandwiches are top a la carte sellers. Bagels and oatmeal—offered with an array of toppings—are popular, as well.

BEST BREAKFAST CUSTOMERS

% of restaurant visits for breakfast and a.m. snacks.



Source: NPD CREST



ETHNIC SELLS

In addition to convenience, breakfast marketers report growing success selling health-oriented items and ethnic foods.

Many operations are adding breakfast burritos similar to those popularized by fast-food chains like McDonald's, Burger King and Carl's Jr. Lafayette College reports strong sales of its Mexican burrito, which features a flour tortilla filled with scrambled eggs, breakfast sausage, Cheddar cheese, onion and salsa.

To cash in on the growing popularity of Mexican-influenced dishes, Bob Evans launched a Fiesta Skillet on June 1 along with two other new breakfast items. The dish, which sells for about $4.75, combines an omelet with sausage, diced potatoes, green and red peppers, onion, picante sauce and shredded cheese.

The chain's other new items for summer are a Country Skillet—an omelet with home fries, sausage, country gravy, shredded cheese and biscuits—priced at $4.75; and a new fresh fruit dish, which consists of a half cantaloupe with pineapple, grapes and strawberries, that comes with two muffins. "I think successful people are going to be the ones that blend nutrition with taste. That's the kind of items that we're working on," says Williams. "We're not in a fad with the health concerns. Clearly, we are in a trend."

PRICE OF ADMISSION

Price strategies vary widely across the industry. But concerns of value have prompted more operations to offer discounts at breakfast.

When McDonald's permanently reduced

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Aging population might boost breakfast sales.

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the prices of its basic hamburgers to 59 cents and its cheeseburgers to 69 cents, it didn't forget breakfast: The chain also knocked the price of a plain sausage biscuit to 79 cents.

And Shoney's recently gave a shot to its breakfast sales by promoting its all-you-can-eat breakfast bar at $2.99, a dollar off its regular weekday price.

But not all operators agree that price cutting is the answer.

Tom McNulty, Village Inn's senior vice president of marketing, says his chain has moved away from discounts in recent years. "We're very countertrend. We may not have as many people coming in the door every week as some of our competition, but we're operating at full margins," he says.

"We're not big fans of discounting," McNulty continues. "Given our druthers, if you're going to add the margins together at the end of the year, we'd rather have fewer people . . . and not put so much wear and tear on our facilities and on our people. Why have 3,000 more people a week if you're not going to make any more money?"

McNulty also says that coupon-driven customers are transient customers. "It's our belief that the people who are coming for the coupons, when the coupons dry up, they're gone too. They're looking for the next deal somewhere else."

THE DEMOGRAPHICS OF BREAKFAST

Operators say older customers are more likely than younger guests to sit down for a breakfast away from home—an observation that is supported by CREST numbers. "I find especially younger people running to work. They just run in the cafeteria, grab a self-service sandwich and consume it at their desks," says Roliz.

The aging of the U.S. population appears to bode well for breakfast business, given the tendency of older customers to devote more of their restaurant visits to the morning meal.

Williams warns against projecting today's behavior to tomorrow's customers, but he agrees that the graying of America will affect the breakfast business.

"As people get older, the fact that they eat two meals a day instead of three seems to be a fact that is projectable. They eat at about 10; they eat at about 4:30," he says. R&I

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